4-Sight FAX Client v7.5

User's Guide

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Welcome to 4-Sight FAX Client

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Introduction

4-Sight FAX allows you to send and receive fax messages from your Macintosh and PC. It has all the same features as previous 4-Sight FAX versions, plus several new features designed to enhance the user experience and increase productivity.

New 7.5 Client Features:

- Email to Fax: Send faxes from your email client through a simple, easy to use format
- User personal save folder for incoming faxes
- 64-bit Print Driver Capabilities for Mac and Windows
- Significant overall speed and performance increase.
- XML/RPC updates
- Smart notification for incoming faxes
- Direct faxing of PDF, PNG, and TIFF file attachment, eliminating print driver requirement

Existing Features:

- Automatic end-user fax notification.
- Document drag-and-drop faxing.
- Apple Address Book support.
- Convenient automated program update notification and installation.
- View number of new messages from the MAC dock or Windows Taskbar.
- User configurable/alternate port number preference for the fax server.
- Line control for faxing.
- Email Suite – allows you to send and receive emails as PDF files.
- Preview frame in the Fax Client window allows you to instantly view thumbnails of incoming and outgoing faxes.
- Enhanced Fax Composer contains a variety of views when creating a new fax. This provides much larger viewing areas for recipients, attachments and comments.
- SMTP authentication for added security when sending Email.
- Send and receive faxes from your desktop.
- Address grouping provides convenient contact list segmentation.
- Customizable interface (font type, size, labels, default cover pages and messaging.
- Client-side imaging, which eliminates the need to duplicate fonts and applications on the Fax Server.

- Windows® Client software for; Windows 98, ME, 2000 and XP. Macintosh Clients for OS 9, and OS X.
- Server and Client-based address books.
- Remote access via TCP/IP – where connecting to your fax Server is as close as an Internet connection.
- Support for Direct Inward Dial.

1. Installing 4-Sight FAX Client

In this chapter:

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Software Requirements

Minimum Software Requirements

4-Sight FAX Client for Macintosh		4-Sight FAX Client for Windows	
Mac OS 9.23	Mac OS X 10.3 – 10.6	Windows 98, and ME	Windows 2000 and XP, Vista, and 7(not compatible with Windows NT)
96MB - 128MB RAM	256 MB RAM	96MB - 128MB RAM	128MB - 256MB RAM
20MB HDD space	20MB HDD space	20MB HDD space	20MB HDD space

Installation

How to install 4-Sight FAX Client

1. Downloaded the 4-Sight FAX Client from the 4-Sight FAX website and copy it directly onto each machine that will run the Fax Client software. Launch the Installer locally. DO NOT run the Installer from another location or machine, such as a network file server.

2. Double-click on the appropriate installation program. The installation program is based on the operating system you have installed.

3. View the Read Me file and click **Continue**.

4. Click **Install**. Files are copied to your local hard drive.

5. Click **Restart** (OS 9) or **Quit** (OS X).

Upgrading from Previous Versions

The installation program handles all upgrade issues.

What's Next?

Before you can start using 4-Sight FAX Client, you must configure your 4-Sight FAX client. Chapter 2 details these procedures.

2. Configuring 4-Sight Fax Client

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Getting Started

Three items that you MUST have in order to send and receive faxes:

1. The 4-Sight FAX Server must be installed and running on your network.

2. A complete installation of 4-Sight FAX Client on your computer.

3. A user login, with a name and password that was created for you on the 4-Sight FAX Server. Contact your network or office administrator for your login and password.

Note:

- You must know the public static external IP address of the 4-Sight FAX Server if you are connecting to from outside your local area network (LAN).

Connecting and Logging into a 4-Sight FAX Server

You must indicate to your 4-Sight FAX Client which 4-Sight FAX Server you want to use to send and receive fax messages.

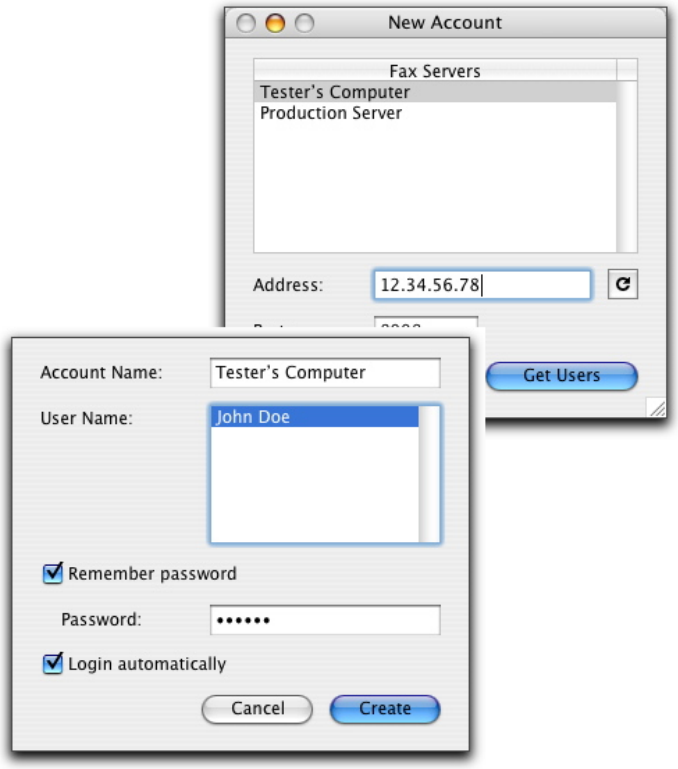
No fax server account exists. Do you want to define one?
In order to log into an account on a 4-Sight Fax server, you need to configure an account in Fax Client.
Work Offline
New Account...

This dialog box appears if you do not have at least one 4-Sight FAX Client account (user) defined, such as when you launch 4-Sight FAX Client for the first time, or if you have deleted all accounts on this machine.

Note:

- See **How do I?** on page **12** for more information.

How do I?



Do the following to continue:

Click …	To…
New Account	Create an account for this 4-Sight FAX Client running on this machine. Select your account name by choosing the fax server from the 4-Sight FAX Server list. This can be the same or different from your username.
Work Offline	Create faxes now. 4-Sight FAX Client automatically puts them into the Pending folder. When you connect to the 4-Sight FAX Server, you can send the faxes immediately or schedule them for a later time.

1. Click **New Account** to:

   - Select the 4-Sight FAX Server you want to use to send and receive faxes.
   - Select your user name that was created for you by the fax administrator for the FAX Server you selected.

2. Select the FAX Server you want to use from the **Fax Servers** list.

3. Select **Get Users** and then select your name from the **User Name** list. Decide from the following options:

Option	Description
Account name	Decide how you want your name to appear on your window when you login.
Remember password	Allows the Fax Client to remember your password so you are not asked for it each time you log into 4-Sight FAX Client.
Password	Enter the password that was assigned to you when logging into the selected FAX Server.
Login automatically	Allows the Fax Client to automatically log you into the 4-Sight FAX Server when you launch the client.

4. Click **Create**.

5. Select your user name from the Folder List.

6. Click the icon to start.

Fine-Tuning Login and Notification Preferences

Use the Account Settings dialog box to define the following:

Tab…	What you can configure…
Account	• Display user name. • IP Address and Port of the 4-Sight FAX Server. • Alias. • Login options.
Options	• The default folder to view when you login. • Show faxes for all users. (If you have the 4-Sight FAX Server privilege.) • The default cover page to use when sending faxes. • View which options and features are currently available.
Email	• Fax Forward to Email option.
Notification	• How often (in minutes) the FAX Client should check the FAX Server for new messages. • Whether or not you want to be notified when you receive or send a fax. • Allow notification of activity for either *all* or *only your* outgoing or incoming messages. • Notification method, either a pop-up window, sound or both.

The Account Tab

How do I ?

1. Launch and log into the 4-Sight FAX Client application.
2. Access the Account [name] dialog box:

- From the **Folders List**, double-click on your user name next to the icon.
- Select the name from **Folders** list, and then from the **Windows** pull-down menu, select **Properties**.

3. Click the **Account** tab. You can configure the following:
   - Click **Apply** when done.

Option	Description
Name	Decide how you want your name to appear when you login.
Server	Displays the current 4-Sight FAX Server you are using to send and receive messages.
Address	You can view or change the current IP address of 4-Sight FAX Server you are using to send and receive messages.
Port	You can view or change the (communication) Port 4-Sight FAX Server is currently using. The default is port 8008.

Option	Description
User Name	You can view or change your user name. Changing this can cause login failure problems if it does not match the user name listed on the Fax Server.
Alias	Enter or select an alias (alternate display name) when sending faxes.
Remember Password	Allows the Fax Client to remember your password so you are not asked for it each time you log into 4-Sight FAX Client.
Password	Enter the password that was assigned to you when logging into the selected FAX Server.
Login automatically	Allows the Fax Client to automatically log you into your account displayed in the **Folder List** when you launch the client.

Notes:

- If you selected **Remember Password** and/or **Login Automatically,** changes will take affect the next time you launch 4-Sight FAX Client**.**
- To automatically log into the selected 4-Sight FAX Server when you launch the application, select BOTH the **Remember Password** (even if you have not defined a password) and the **Login Automatically** options.
- **IP Address** and **Port Number** can only be changed when you are logged out of the fax server.
- Changing your **User Name** can create login problems if this does not match is the user name set up on the Fax Server.

The Options Tab

How do I ?

1. Launch and log into the 4-Sight FAX Client application.
2. Access the Account [name] dialog box:

- From the **Folders List**, double-click on your user name next to the icon.
- Select the name from **Folders** list, then from the **Windows** pull-down menu, select **Properties**.

3. Click the **Options** tab. You can configure the following:
   - Click **Apply** when done.

Option	Description
Login Folder	You can decide which queue (incoming, or outgoing) you want 4-Sight FAX Client to display when you login.
Show faxes for all users	Allows you to view all incoming and outgoing faxes from all users on this FAX Server, **Note:**

Option	Description
	• You can only view faxes for all users if you have the **Full Queue Access** feature enabled on the Fax Server.

Option	Description
Default cover page	Allows you to define a default cover page to use when sending messages. **Note:** • You can change which cover page you want within the Fax Composer.
Default Fax Line	Allows you to select a different fax line, if this FAX Server has more than one fax line. The default is **Next Available**.
Phone Card	Allows you to configure a default phone card number to use when accessing the 4-Sight FAX Server from a remote location, such as from a hotel, bypassing the additional hotel phone and toll charges.
Privilege/Value	Displays which options or features are currently available or not available.

The Email Tab

How do I?

1. Launch and log into the 4-Sight FAX Client application.
2. Access the Account [name] dialog box:

- From the **Folders List**, double-click on your user name next to the icon.
- Select the name from **Folders** list, then from the **Windows** pull-down menu, select **Properties**.

3. Click the **Email** tab. You can configure the following:
- Click Apply when done.

Option	Description
Enable fax forwarding to email	Enable this feature to receive an Email with the fax attached as a PDF file. **Note:** • You must purchase the ”Email Suite” feature separately.

Option	Description
Email Address (Incoming)	Enter your Email address where you receive Email messages.
Email Address (Outgoing)	Enter the Email address where you want messages forwarded. Faxes are sent to this email address in PDF format.

The Notification Tab

How do I ?

1. Launch and log into the 4-Sight FAX Client application.
2. Access the Account [name] dialog box:

- From the **Folders List**, double-click on your user name next to the icon.
- Select the name from **Folders** list, then from the **Windows** pull-down menu, select **Properties**.

3. Click the **Notifications** tab. You can configure the following:

- Click **Apply** when done.

Option	Description
Show notifications of activity	Allows you to receive notification (either by a pop-up window, sound or both) that either a fax has been received, or that a fax has been successfully sent, failed or rejected.
Refreshes the queues every _ minutes	You can define, in minutes, how often you want the 4-Sight FAX Client to check the 4-Sight FAX Server for any new activity (incoming and outgoing).
Give me notification of:	Depending on your FAX Server defined user rights (Full Queue Access) you can either receive notification on **All…** activity or just your own (**My…)** **Outgoing** - All faxes sent successfully, failed or rejected by the intended recipient **Incoming** – any new faxed received.
Option	**Description**
Notification method	You can receive either a pop-up message window, computer sound or both when an activity occurs for the selected account.

Logging In from Outside Your Local Area Network (LAN)

4-Sight FAX Client and the Fax Server communicate with each other using the TCP/IP protocol. Because of this, you are able to log into the Fax Server from anywhere in the world using a Client computer that has Internet access. The computer on which the Fax Server is running **must** have a static public (external) IP address. The procedure for setting up this type of login is the same as if you were logging in from within your LAN.

What's Next?

Review the following sections for more information about sending and receiving faxes, managing your address books and working with the queues and folders.

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3. Sending Faxes

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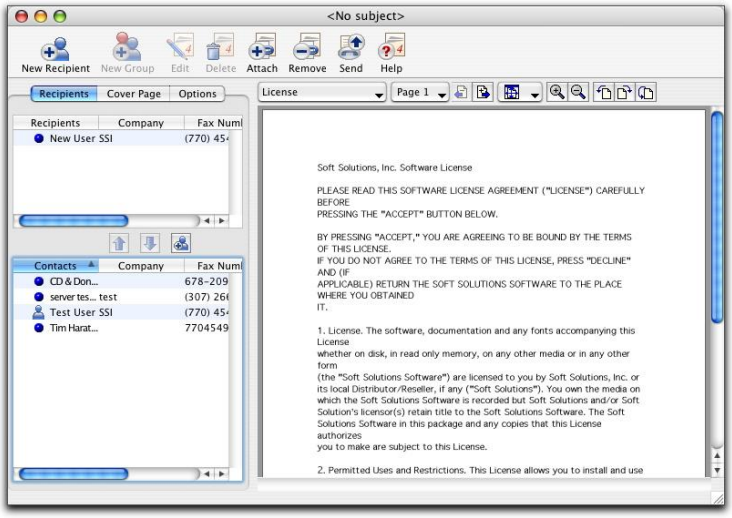
Sending Faxes

How it all works: The process of sending a document as a fax is a 5-step process:

Step	Process	Description
1	Create a fax document	Create a fax document from most any application, or resend/forward an existing fax from within 4-Sight FAX.
2	Convert document into a format suitable for faxing.	If you are creating a fax message from within an application (other than 4-Sight FAX), your document is converted into a format suitable for faxing – a group 4 TIFF image file. This is done via the 4-Sight FAX Print Driver. If you are creating a fax within 4-Sight Fax, there is no need to convert the document into a fax format, unless you include attachments.
3	Select recipients and fax details	This is where you can select your recipients, cover page and include attachments you want to in the message. You can also schedule to send the message at a later time. Depending on which 4-Sight FAX Client option you have installed, you can decide to send the message as a fax, an Email, or both at the same time. **Note:** • You must purchase the Email Suite to send and receive faxes as Emails.
4	The fax is sent to the 4-Sight FAX Server	The following happens: The selected cover page is attached to your fax, along with the appropriate information, such as name of the contact, etc. The fax is placed in the outgoing queue for transmission.
5	Notification	Depending on when you scheduled the 4-Sight FAX Server to send your fax, you can receive an automatic notification of the status of your fax.

Note:

- You must be logged into the 4-Sight FAX Server to send a fax. If you are not connected to a Fax Server, the fax is placed in your **Pending** folder. You will have the option to send the fax the next time you connect to a 4-Sight FAX Server.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New Recipient
New Group
Edit
Delete
Attach
Remove
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How do I?

1. Using the table below, decide how you want to send a fax.

Send From...	Description...
Most applications	• **OS 9.x:** If the **4-Sight FAX** printer driver is not the default, press the <option> key, point to the **File** menu, and select **Fax**. • **OS 10.x/Windows:** If the **4-Sight FAX** print driver is not the default, go to the File menu, and select **Print**. Select 4-Sight FAX from the printer list. • If the **4-Sight FAX** printer driver is the default, point to the **File** menu, select **Print**. Proceed to step 2.
Within 4-Sight FAX	• To create a new fax, click the New Fax button . • To Resend an existing fax message (Outgoing queue only), click the Resend button . • To Forward an existing fax message (Incoming queue, Outgoing queue, Sent Faxes and Personal Folders), click the Forward button . Proceed to step 2.
Outside of 4-Sight FAX	Drag and drop documents onto the 4-Sight FAX Client icon on your desktop, or the OS X dock. Multiple documents can be dragged onto Fax Client together if you wish to include them in the same fax document. Proceed to step 2.

2. Click the **Recipients** tab. Select the recipients from the Current Address Book section.

   - You can choose individual contacts and groups from your personal Client-based address book, from a Server-based address book, or from the Apple Address Book (OS X only) if one is available (Server-based contacts are indicated by a blue bullet in the Name column.) You can also enter your own recipients, one at a time, in the Quick Entry fields.

To...	**Do the following…**
Include a contact	Select the contact(s) you want and click . • To select multiple contacts (sequential), hold the <Shift> key and select the first and last contact. • To select multiple contacts (non-sequential), hold the <Command> key (use the <Control> key if you are on a PC) and select the contacts you want.
Remove a contact	Select the contact(s) you want and click . • To select multiple contacts (sequential), hold the <Shift> key and select the first and last contact. • To select multiple contacts (non-sequential), hold the <Command> key (use the <Control> key if you are on a PC) and select the contacts you want.
Include a contact that is not in your address book	Click the Quick Entry icon. You must provide the contact's **Full Name** and **Fax Number.** You can also include the **Company Name** and **Email** address. These entries will not be added to your address book. **Note:** • The Fax Server's Smart Dialing feature does not apply to any fax numbers you enter in the Quick Entry fields. Be sure to enter these numbers exactly as they should be dialed, including a "1" if long distance, or any codes and prefixes required for international dialing.

5. Click the **Cover Page** tab and select or enter the following:

   - Decide if you want to send this fax as the currently logged-in user name or as another user from the pull-down menu next to **Sender**.

- Decide if you want to send this message as a Fax, Email or both. You must have purchased the Email Suite to send messages as Emails.
- Select the **Cover Page** you want to use.
- Enter a **Subject** for this fax message.
- Assign a **Priority** to this fax message.
- Decide if you want to send this message as a ***Private*** Fax. Select this option if you do not want anybody to see or have a record of this message. You must have permission from the Administrator to send Private faxes.

6. Use the following chart to continue your setup:

To...	**You must...**
Provide additional comments	Select a **Cover Page** to include additional comments. Enter your comments in the **Comments** text box. Tip: • Click on the Annotation tool icon to include additional mark-ups. See **Annotating Messages** on page **46** for more information.
Include any attachments	Click the Attach button . You can attach multiple documents to the fax message, but only one document at a time. See **Including Attachments** on page **28** for more information.
Insert Data into Billing Fields	If your Administrator has activated any of the three customizable Billing Fields on the Fax Server, these will appear under the Comments section. Complete the information for each field as required.

7. Click the **Options** tab and select from the following options:

- Decide which F**ax Line** you want to use to send your fax. This option is useful if more than one fax line is available and if one fax line is unavailable or busy and unable to send your fax now.
- Decide if you want to make use of your **Phone Card** to send this message.
- Decide when you want to **Schedule** your fax to be sent.
  - Click **Send Now** to allow 4-Sight FAX Server to process and transmit the fax immediately.

- Click **Send Later** to schedule 4-Sight FAX Server to send the message at a later time.

8. Click Send .

About Attachments

What is an Attachment?

An attachment is a printable file that is appended to your fax message. Attachments always follow the cover page, if one is used. A printable file is practically any file from a word processor, spreadsheet or graphics program that you can print to a printer. Executable and JAR files are examples of non-printable files.

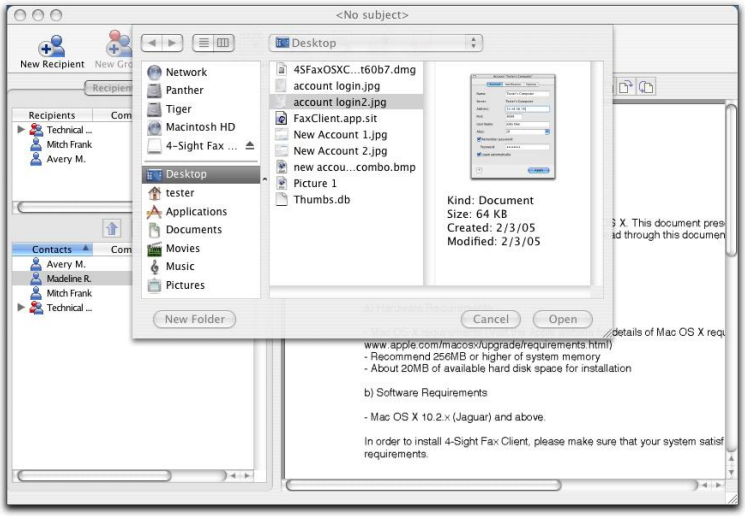
Why should I use Attachments?

Use attachments to include additional information that you would otherwise have to send as a separate message. Attaching a document allows you to quickly send information such as letters, charts, pictures or other documents as faxes.

How do Attachments work?

Within the Composer, click the Attach button and select the printable files, one at a time, to include with the fax. You can include as many attachments as you want. Each file attachment is converted into a fax (TIFF) image file on your local computer and appended to the end of the fax. If you attach more than one file to the fax, the attachments appear in the order they were selected.

Including Attachments



How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.

2. Prepare a fax for sending. See **Sending Faxes** on page **24** for more information.

3. Click the Attach button to locate a document to include in this fax. Click **Open**.

   The document is opened in the application that was used to create it, or the currently selected default application for that file type. Although a print command is automatically issued using the 4-Sight FAX printer driver, you must select the print range and click **Print**. The document is then converted into an image file suitable for faxing. The file is attached to the fax message. You can preview the attachment(s) in the viewer section of the Compose New Fax Window, under the Fax Details tab.

4. When done, click the Send button.

Notes:

- If your machine does not have the appropriate software to open and print the document or file, then you cannot include it as an attachment.

- You can add as many documents as you want, but only one at a time.

Scheduling a Fax

How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.

2. Use the following chart to continue scheduling:

From the…	Follow these steps:
Outgoing Queue	• Access the **Outgoing Queue** and select a fax, with a status of **Waiting** that you want to schedule for some time in the future. • Click the **Edit** button . • Click the **Options** tab. Proceed to step 3.
Pending Faxes	• Access the **Pending Queue** and select a fax that you want to schedule for some time in the future. • Click the **Edit** button . • Click the **Options** tab. Proceed to step 3.
Fax Composer	Click the **Options** tab**.** You can decide the following: • **Send Now** • **Send Later**. Proceed to step 3.

3. Select a different time and date (year, month, and day) to send the message.

4. Use the following chart to continue:

From the…	Follow these steps:
Outgoing Queue	Click **Apply**.
Fax Composer/Pending Faxes	Click the Send button .

Sending a Private Fax

Use the Private Fax option if you want to send a message and you do not want anybody to see or have a record of it.

How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server and click **New Fax**.

2. Prepare a fax for sending. See **Sending Faxes** on page **24** for more information.

3. Click the **Recipients** tab, select or enter recipients,

- From then click the **Cover Page** tab and select or enter the required information, then select the **Private Fax** check box

4. Click the **Options** tab and decide which fax line to use, phone card information, if necessary, and then schedule (now or later) the message to be sent..

Notes:

- Only you will see or have a record of your private fax being sent.

- The Private Fax option is valid for only the current (one-time) fax. If you want to send more than one private fax, you must select the **Private Fax** option for each new fax. This option must be enabled from the Fax Server.

Resending a Fax

You can resend a fax that failed to get transmitted if it reached the maximum number of retries as defined on the FAX Server, or if you edited the recipient information.

How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server and click on the Outgoing Queue button.

2. Select the fax you want to resend and click the Resend button.

Tip:

- Click the Edit button to verify you have the correct name, fax number and company name. You can also view details about the fax, including the total number of pages, the original sender of the fax and the date the fax was created.

Notes:

- You can only resend a fax from the Outgoing Queue.
- You can only **Resend** one fax at a time.

Forwarding a Fax

You can Forw-ard (or resend) a message to other recipients that were not originally on the recipient distribution list.

How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.
2. You can forward a fax message from the **Incoming Queue**, **Outgoing Queue**, **Sent Faxes** folder, or from a **Personal Folder** you have created.
3. Select the fax you want to forward and click the Forward button .
4. Click on the **Recipients** tab. Select the recipients from the Current Address Book section.
   - You can choose individual contacts and groups from your personal Client-based address book, from a Server-based address book, or from the Apple Address Book (OS X only) if one is available (Server-based contacts are indicated by a blue bullet in the Name column.) You can also enter your own recipients, one at a time, in the Quick Entry fields.

To...	Do the following…
Include a contact	Select the contact(s) you want and click . • To select multiple contacts (sequential), hold the <Shift> key and select the first and last contact. • To select multiple contacts (non-sequential), hold the <Command> key (use the <Control> key if you are on a PC) and select the contacts you want.

To...	Do the following…
Remove a contact	Select the contact(s) you want and click . • To select multiple contacts (sequential), hold the <Shift> key and select the first and last contact. • To select multiple contacts (non-sequential), hold the <Command> key (use the <Control> key if you are on a PC) and select the contacts you want.
Include a contact that is not in your address book	Click the Quick Recipient icon. You must provide the contact's **Full Name** and **Fax Number.** You can also include the **Company Name** and **Email** address if you want. These entries cannot be added to your address book. **Note:** • The Fax Server's Smart Dialing feature does not apply to any fax numbers you enter in the Quick Entry fields. Be sure to enter these numbers exactly as they should be dialed, including a "1" if long distance, or any codes and prefixes required for international dialing.

5. Click the **Cover Page** tab and select or enter the following:

   - Decide if you want to send this fax as the currently logged-in user name or as another user from the pull-down menu next to **Sender**.
   - Decide if you want to send this message as a Fax, Email or both. You must have purchased the Email Suite to send messages as Emails.
   - Select the **Cover Page** you want to use.
   - Enter a **Subject** for this fax message.
   - Assign a **Priority** to this fax message.
   - Decide if you want to send this message as a ***Private*** Fax. Select this option if you do not want anybody to see or have a record of this message. You must have permission from the Administrator to send Private faxes.

6. Use the following chart to continue your setup:

To...	You must...
Provide additional comments	Select a **Cover Page** to include additional comments. Enter your comments in the **Comments** text box. **Tip:** • Click on the Annotation tool icon to include additional mark-ups. See **Annotating Messages** on page **46** for more information.
Include any attachments	Click the Attach button . You can attach multiple documents to the fax message, but only one document at a time. See **Including Attachments** on page **28** for more information.
Insert Data into Billing Fields	If your Administrator has activated any of the three customizable Billing Fields on the Fax Server, these will appear under the Comments section. Complete the information for each field as required.

7. Click the **Options** tab and select from the following options:

   - Decide which F**ax Line** you want to use to send your fax. This option is useful if more than one fax line is available and if one fax line is unavailable or busy and unable to send your fax now.
   - Decide if you want to make use of your **Phone Card** to send this message.
   - Decide when you want to **Schedule** your fax to be sent.
     - Click **Send Now** to allow 4-Sight FAX Server to process and transmit the fax immediately.
     - Click **Send Later** to schedule 4-Sight FAX Server to send the message at a later time.

8. Click Send .

Notes:

- About forwarding messages and cover pages:
  - If you forward a fax from the Outgoing Queue or Sent Folder, the original cover page (if one was initially used) is included.
  - If you forward a fax from your Personal Folder the original cover page (if one was initially used) is not included.

- You must be logged into the 4-Sight FAX Server to send a fax. If you are not connected to a Fax Server, the fax is placed in your Pending folder. You will have the option to send the fax the next time you connect to a 4-Sight FAX Server.

Rejecting a Fax in Transit

How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.
2. Access the **Outgoing Queue** and locate the fax that is in progress of being sent.
3. Click the Reject button . The fax is stopped.

Suspending (Holding) a Fax

How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.
2. Access the **Outgoing Queue** and locate the fax that you want to suspend or hold and click the Hold button .

   Fax messages that are on hold are indicated by the date field, which changes from the current date to *<suspended>*.

Note:

- You can only Hold (suspend) and Release faxes from the **Outgoing Queue**.

Releasing a Suspended Fax

How do I?

1. Launch the 4-Sight FAX Client application and log into the
   4-Sight FAX Server.
2. Access the **Outgoing Queue** and select the currently suspended (held) fax and click the Release button .

   The date field displays the date the fax was originally scheduled. Otherwise, the current date is displayed and the date is displayed without Italics.

Email To Fax

How do I?

The email to fax feature works by sending an email from your email client to a specific email address on your network. Your FAX Server Administrator will establish a specific email address on your network to check. The 4-Sight FAX Server will then check this email account at specified intervals, converting any emails to a fax. We recommend an email address of 'fax@yourdomain.com'.

Formatting Requirements:

The subject line of the email will be the subject of your fax, and any attached .PDF or .PNG files will be included in the fax.

1. Open a new email in your email client (Apple Mail, Entourage, Thunderbird, etc.)

2. Address the email to the address you assigned on your network to handle email to fax (i.e. fax@yourcompany.com)

3. Use this format in the body of the email:

   Recipient Name:Company:Fax Number
   #CoverPageNumber#
   Comments
   ##

   Examples:

   1: With a cover page number

   Jane Doe:CompanyX:15555552222
   #2#
   These are sample comments
   ##

   2: Without a cover page number

   Jane Doe:CompanyX:15555552222
   ##
   These are sample comments
   ##

4. Send your email.

5. User of the email to fax feature will receive an email from the fax server providing feedback (i.e., successful, unsuccessful, etc.).

NOTES:

- If no cover page number is entered, but comments are provided, the server will automatically choose cover page #1.

- Supported file formats are ".PDF" and ".PNG"

4. Receiving Faxes

In this chapter:

Receiving Faxes	**42**
Viewing Faxes	**43**
Annotating Messages	**46**
Printing Faxes	**47**
Assigning Faxes	**48**
Opening Previously Saved Faxes	**49**

Receiving Faxes

You can receive and view a new fax message by:

- Clicking the Refresh icon to allow the 4-Sight FAX Client to check for new (incoming) faxes.
- Accessing the **Incoming Queue**.
- If you have configured your 4-Sight FAX Client to display a pop-up window when you receive a new fax, the following dialog box appears.

Things to keep in mind:

- It is not required that you have the 4-Sight FAX Client running, or have any notification options enabled to receive a fax at your workstation. However, you will not know if you have received a fax until you launch and login to the 4-Sight FAX Server.
- If you do not have a DID line, or you did not purchase the DID option for 4-Sight FAX, you can assign all incoming faxes on each modem to a default user with the Automated Line-Based Routing (ALBR) feature. This option is activated within the 4-Sight FAX Server. Refer to the Administrator's Guide for more information.
- If you do not designate a specific user to receive incoming faxes, then all users with Full Queue Access will receive notification of a new fax. Refer to the Administrator's Guide for more information.

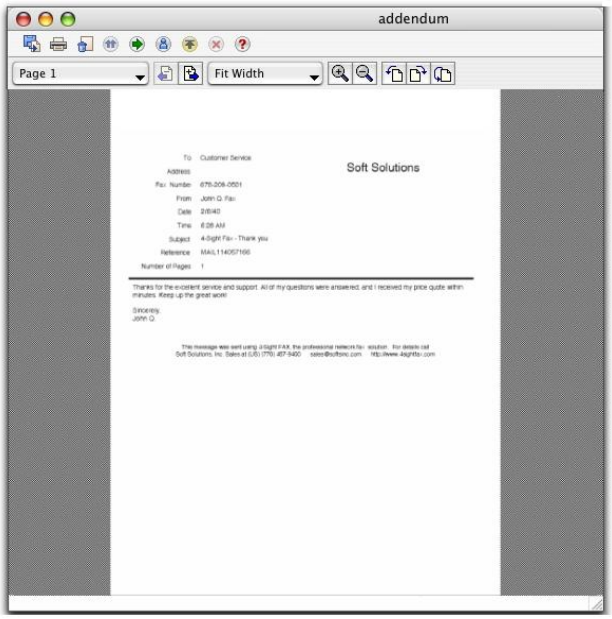
Notes:

- To check for new messages or to view faxes, you must be logged into the fax Server.
- You can **Assign** faxes from the **Incoming Queue** to any other fax user on the selected 4-Sight FAX Server.
- New faxes are shown in green until they are viewed.

Viewing Faxes

Notes:

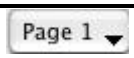
- You cannot Resend, Forward, or Assign any saved fax that you open and view outside of the 4-Sight Fax Client.
- To annotate a fax from the fax viewer, you must click the Resend, Forward icons.



How do I?

- You can do the following when viewing a fax:

Button/ Field	Function
	Save a fax to another location on your hard drive or network.
	Print the fax to the current or default printer.
	Permanently delete the fax from 4-Sight FAX Client. **Warning:** • You cannot "undo" this action.
	To Resend an existing fax message (Outgoing queue only). You can resend a fax that failed to be transmitted if it reached the maximum number of retries as defined on the FAX Server, or if you edited the recipient information.

Button/ Field	Function
	To Forward an existing fax message (Incoming queue, Outgoing queue, Sent Faxes and Personal Folders). You can Forward (or resend) a message to other recipients that were not originally on the recipient distribution list.
Button/ Field	**Function**
	Assign an incoming fax to another fax user on the 4-Sight FAX Server. This option is only available if you view a fax from the **Incoming Queue**.
	Temporarily halt the transmission of the selected fax message.
	Prevent the 4-Sight FAX Server from transmitting the selected fax message.
	Access the online help system.
	Move directly to any page of a fax.
	Move backward to the previous page in the fax message.
	Move forward to the next page in the fax message.
	View the fax: • Fit page • Fit Width • Fit Height • Zoom: 25%-200%
	Increase zoom magnification in increments of 25%.
	Decrease zoom magnification in increments of 25%.
	Rotate the fax page in increments of 25 degrees to the left.
	Rotate the fax page in increments of 25 degrees to the right.
	Rotate the fax page in increments of 180 degrees to the left.
	View the next message from the current queue.
	View the previous message from the current queue.

Notes:

- The **Assign** button is only available when viewing an incoming fax.

- You can only assign a fax message to another 4-Sight FAX user.

- You cannot save a rotated fax as being rotated. It will save as it was originally displayed.

Annotating Messages

You can only annotate a fax that you just created, or any existing fax that you want to Forward, Resend and schedule for some time in the future.

Note:

- You can only annotate a fax from the Fax Composer.

How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.

   Under the **Folder List,** click on your user login name.

2. Create a new fax, or select an existing fax that you want to Forward or Resend for sometime in the future.

3. From the Fax Composer, click the Annotate icon . The Annotation floating tool bar appears. Use the following annotation tools to mark-up the message.

Button	Function
	Reposition the fax within the window.
	Create free-hand mark-ups with a Black colored pen.
	Create typed “sticky notes” or comments within the fax.
	Create free-hand mark-ups with a White colored pen.
	Erase any mark-ups created with any annotation tool.

4. Click the Send button .

Notes:

- You can include as many mark-ups as you want to the fax.
- You cannot do the following:
  - Move a mark-up.
  - Change the angle of text
- The eraser tool only removes mark-ups made with the annotation tool.

- The original fax content cannot be changed, other than what you do with the any annotation tool.

Printing Faxes

How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.

   Under the **Folder List,** click on your user login name.

2. View a received fax by accessing the Incoming Queue or a Personal folder (if you moved the fax from the Incoming Queue), then double-click on the fax.

3. Click the Print button .

Note:

- You must view the fax message before you can print a hard copy.

Assigning Faxes

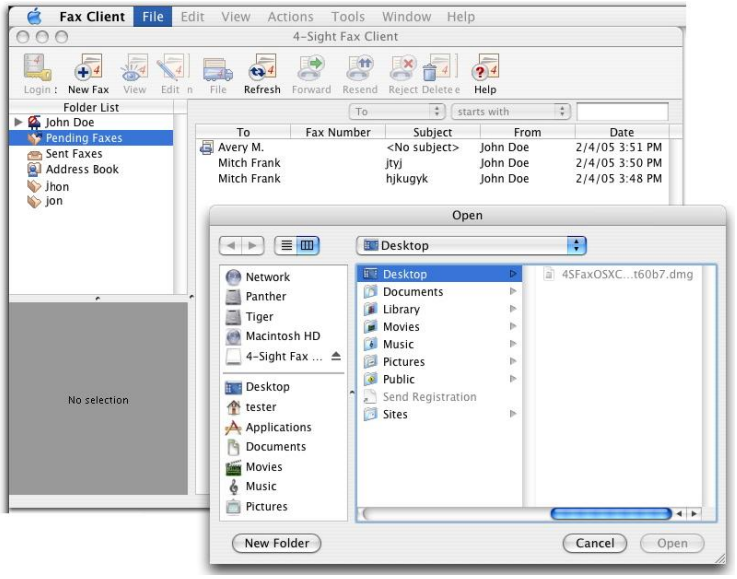
How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.
2. View the fax that you want to assign by double-clicking on its listing or by selecting it from the **Incoming Queue** and clicking the **View** button.
3. Click the **Assign** button and select the current 4-Sight FAX user(s) that you want to view this fax message. If you want, you can also change the **From** and **Subject** text.
4. **Click** OK.

Notes:

- You can only assign faxes to other 4-Sight FAX Client users.
- The Assign option is only available for Incoming Faxes.
- If the Fax Forward to Email option is purchased and enabled for the assigned user, that user will receive an Email with the fax attached as a PDF file.

Opening Previously Saved Faxes



How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.

2. On the **File** menu, click **Open Fax**.

3. Locate and click on the fax you want to view.

   The fax appears in the **Fax** viewer.

   Use the Attachment Viewer to view the fax. When you are done, you can send the fax message to the contact(s) you have selected.

5. Managing Your Address Books

In this chapter:

Topic	Page
About Address Books	52
Opening and Creating Address Books	53
Creating, Modifying and Deleting Address Book Contacts	53
Creating, Modifying and Deleting Address Book Groups	57
Searching an Address Book	59
Importing Address Books	61

About Address Books

Although you can have multiple address books on your client machine, you can only display and use one address book at a time.

You can do the following with Address Books:

- Locate a personal or global address book entry to edit or view.
- Add and delete address books.
- Add, modify and delete your personal address book contacts.
- Create local groups consisting of contacts from your address book. Use groups to send the same message to multiple contacts at the same time.
- Import an existing 4-Sight FAX version 4 address book, or a tab-delimited text file that was created or exported from another application.
- Unless the 4-Sight FAX administrator granted you specific rights to do so, you cannot delete or Modify Server-based address book contacts or the Apple Address Book from the Client. You also cannot create contact groups using Server address book contacts.
- Groups can only be made up of saved Client address book contacts.
- Client address book contacts are specific to your fax Client installation, and therefore are not available to other fax Client users.

Opening and Creating Address Books

Although you can have multiple address books, only one address book is displayed and available at a time.

How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.

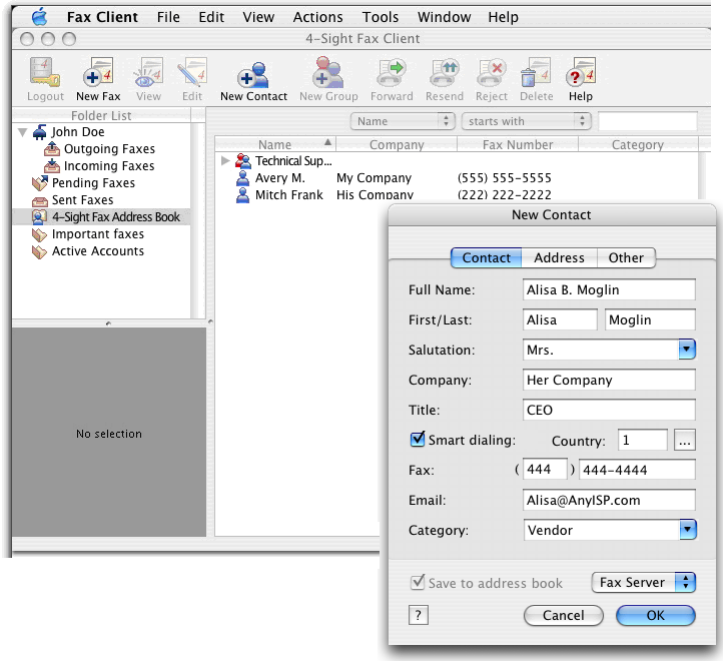
2. Use the following chart to continue:

To...	Then...
Create a new Address Book	On the **File** menu, point to **New** and select **Address Book**.
Open an existing Address Book	On the **Tools** menu, click **Select Address Book…**. Locate the address book you want to use.

Notes:

- When you create a new address book, 4-Sight FAX Client automatically saves the current address book to the default location; *Documents* on MACs and *My Documents* on Windows.

Creating, Modifying and Deleting Address Book Contacts (Entries)



The following table indicates what the address book icons indicate:

Address book Icon	Description
	Personal address book entry.
	Server address book entry.
	Group address book entry.
	Apple address book entry.

Note:

- If your were given the appropriate 4-Sight FAX Server privileges, you can also add (save), delete, and modify fax server address book entries.

How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.
2. From the Folders List, click on the Address Book, located below the **Sent Faxes** folder**.**
3. Use the following chart to continue:

To...	Do the following:
Create a new contact	On the File menu, point to **New** and select **Contact**, or click from within the Address Book. Proceed to step 4.
Modify an existing contact	Double-click any contact. Continue to step 4.
Delete a contact	Select the contact you want to remove and click .

4. Provide the appropriate information, from each tab, to create or modify an address book entry.

From the…	Provide or modify the following contact information…
Contact tab	**Full Name** - The first and last name of the contact. **First/Last Name** - The first and last name of the contact. **Salutation** - Mr., Mrs., Ms., Dr., Dean and Professor. You may also add your own. **Company** - Name of the company or organization where this contact is employed. **Title** - The contact's professional title in the company. **Smart Dialing** - Click this option to allow the Fax Server to attach the appropriate prefix dial code(s) as well as any long distance digits when necessary. If you do not click this button, you must supply all necessary dialing information (prefix codes and long distance digits) yourself. **Country (code)** – The international code that identifies from which country you are sending this message. **Fax (Area-Num**) - Provide the area code or city code and then the fax number in the appropriate fields. **Email** – The Email address of the intended receipt(s). **Category** - An additional method for organizing or grouping your contacts.
Address tab	**Address 1** - Enter the street address of the contact. **Address 2** - Enter additional mailing information here. **City** - Enter the name of the city or township of the contact **State/Province** - Enter the name of the state or province of the contact. **Postal Code** - Enter the postal or zip code of the contact. **Phone Number** - Enter the phone number of the contact.
Other tab	**Custom 1-3** - Use these fields to capture additional information about the contact.

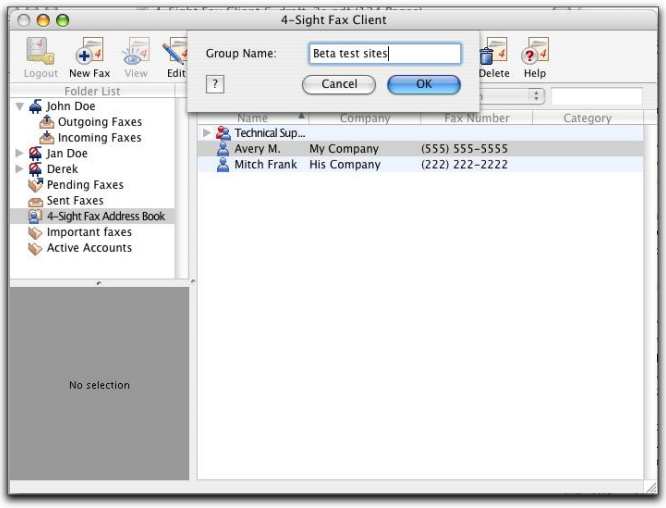
From the bottom of each New/Modify Contact tab…	
Save to address book	**By default, all address book entries are saved to the local address book.** **Note:** • If your were given the appropriate 4-Sight FAX Server privileges, you can also add (save), delete, and modify fax server address book entries.

5. Click **OK**.

Notes:

- You can have as many personal address books as you want, however, you can only have one address book active (displayed) within 4-Sight FAX Client at one time.
- You must provide at least a name (first and last) and a fax number.
- If you do not click the **Smart Dialing** option, you must supply all necessary dialing information, such as a "1" for dialing long distance or "011" for dialing international.
- Server-based address book contacts are identified with a bullet to the left of the name.
- Unless the 4-Sight FAX administrator granted you specific rights to do so, you cannot Delete or Modify contacts from the Server-based address book or from the Apple address book from within the 4-Sight FAX client.
- Your personal address book contacts are specific only to your fax Client account and are therefore not available to other fax Client users.

Creating, Modifying and Deleting Address Book Groups



How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.

2. Select the personal address book that contains the groups you wish to manage.

3. The following chart describes your current options for managing groups:

To...	Then...
Create a new group	Select a contact (or multiple contacts) from your address book. 4-Sight FAX Client assumes that you want those contacts included in your new group. On the File menu, point to **New** and select **Group**, or click the New button. Proceed to step 4 to add contacts to this group.
Modify an existing group	Double-click on a group name. Proceed to step 4.
Delete a group	Select the group you want to permanently remove from your address book and press the icon.

4. Provide or change the **Group Name**.

5. Use the following chart to continue:

To...	Then...
Add contacts to your group	A list of available contacts from your current personal address book appears in the **Available** list box. You can multi-select contacts by pressing the **Command** key for Macintosh or the **Ctrl** key for Windows and clicking on the desired contacts. Drag the selected contacts into the created group.
Remove contacts from your group	A list of selected contacts from your current personal address book appears in the **Selected** list on the right. You can select multiple contacts and remove them from a group by pressing the **Command** key for Macintosh or the **Ctrl** key for Windows and click left. Click the icon.

6. Click **OK**.

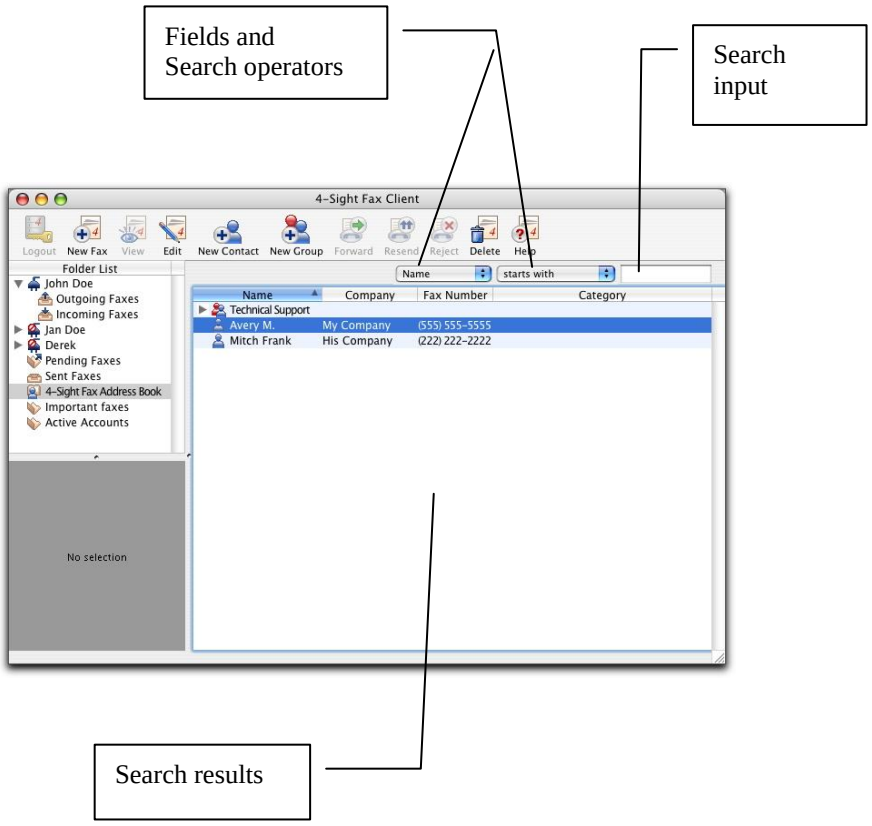
Tip:

- You can select multiple sequential contacts by selecting the first contact, hold down the <**Shift**> key and select the last contact. All contacts in that range are selected.

Notes:

- You can include as many groups to your personal address book as you want.
- You cannot create groups using the Server-based address book contacts. Is this true?
- You cannot create groups within existing groups.
- Removing a contact from a group does NOT remove the contact from your address book. However, if you remove a contact from the address book, it is also deleted from any groups it belongs to.

Searching an Address Book



How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.

   Under the **Folder List,** click on your address book or the group that you want to search.

2. Select the field and search operator you want to use, and provide the appropriate input to define your results. The following chart displays your options:

Fields	Search operators
• Name • Company • Fax Number • Category	• Starts with • Ends with • Is • Is empty • Contains • Does not contain

3. The filtered address book contacts are displayed.

4. To remove the filter, clear the search input field.

Notes:

- The search option filters address book contacts for display purposes only. You cannot import address books with the filter you selected.

- Each search is performed only on the current address book, not including any groups you may have. To only search for names in a group, you must first select that group from the Folder List.

Importing Address Books

How do I?

1. On the **File** menu, select **Import**.

2. Choose the type of address book you want to import. You can choose a 4-Sight FAX **version 4** or a **tab-delimited** text file, which you may have exported from another application. Locate the file, and click **Import**.

3. If you import a Version 4 address book, the contacts are immediately inserted into your current Client address book. All fields are matched to your current address book automatically.

4. If you select Delimited file, an interface will appear that allows you to map the fields of your tab-delimited file to those in the 4-Sight FAX Address Book. See **Using the Mapping Interface** on page **62** for more information.

Using the Mapping Interface

Highlight the first Target field in the right column of the window. Then choose one Source field from the left column (your list of headers) that best matches the Target field. Click **Map**. Your Source field now becomes an Import field and moves into the mapping column. Repeat the process until all of your headings are mapped, and then click Import.

Notes:

- First and Last names are automatically copied, combined (first name <space> last name) and placed into the **Name** field of your Client address book. The reason for this is because the Fax Client window and Fax Composer only display the Name field.

- Make sure that your tab-delimited address book has the correct field heading listed in the very first row of each column. Otherwise, your list will not be properly imported.

6. Managing the Queues and Folders

In this chapter:

Topic	Page
About the Queues and Folders	64
Working with the Incoming Queue	65
Working with the Outgoing Queue	67
Searching the Incoming and Outgoing Fax Queues	70
Working with the Pending Faxes Folder	72
Working with the Sent Faxes Folder	74
Working with the Personal Folders	75
Searching the Various Fax Folders (Sent Faxes, Pending Faxes and Personal Folders)	77
Managing Faxes	78
Managing Reports	81

About the Queues and Folders

Button	Queue/Folder	Click this button to ...
	Outgoing	Display information about the status of faxes that have already been sent or are currently being sent.
	Incoming	Display information about the status and history of received faxes.
	Pending	Display information about the status of faxes that have not yet been sent. These include faxes that have been created and "sent" while you were offline or not connected to the fax Server.
	Sent	Display information about the status and history of sent faxes.
	User-defined Personal Folder(s)	Display faxes that you have copied from the Incoming or Outgoing queue.
	Address	Select current Address Book. You can only have one address book displayed at one time. See **About Address Books** on page **52** for more information.

Notes:

- You must have a user account and be logged into the 4-Sight FAX Server to view the **Outgoing** and **Incoming** Queues.
- The **Show All** option is only available if **Full Queue Access** has been granted to you by the 4-Sight FAX Administrator.

Working with the Incoming Queue

What you can do from the Incoming Queue:

Use the Incoming queue to display information about the status and history of fax messages that you have successfully received. The chart below shows the tools that are available when the Incoming Queue is selected:

Button / Icon	Name	Use this to...
	Log in	Log into the 4- FAX Server via the 4-Sight Fax Client, enabling you to send and receive messages.
	Log out	Log out of the 4-Sight Fax Client.
	New Fax	Create a New Fax See **Sending Faxes** on page **24** for more information.
	View	View the selected fax message. See **Viewing Faxes** on page **43** for more information.
	Assign	To assign fax messages to another 4-Sight Client user. See **Assigning Faxes** on page **48** for more information.
	File	Copy the selected fax message(s) to personal folder. See **Filing Faxes to Personal Folders** on page **79** for more information. **Note**: • If you do not have a personal folder, the **New User Folder** dialog appears. Provide a name for this folder and click **OK.**
	Refresh	Update the Incoming Queue list.
	Forward	Forward the selected fax to a different contact. See **Forwarding a Fax** on page **33**.
	Delete	Permanently remove the fax message from the 4-Sight FAX Server. See **Deleting Faxes and Address Book Contacts** on page **80** or more information.
	Help	Access the online help system.

What the Incoming Queue Displays:

The following describes the columns in the **Incoming** queue.

Item:	Displays...
From	The Company or person who initiated the fax.
To	The intended 4-Sight FAX Client recipient of the fax message.
Subject	The subject or title of the fax message.
Date	The date and time at which the fax message was received by the 4-Sight FAX Server.
Pages	The total number of pages.
Status	The status of fax message: Fax messages can have the following status: **Converting** - processing the raw data and creating a TIFF (image file) format. **Received** - Indicates the complete fax was received. **Printed** - Indicates that the fax message was sent to a printer of your choice.

Working with the Outgoing Queue

What you can do from the Outgoing Queue:

Use the Outgoing queue to display information about the status and history of fax messages that you have sent.

You can do the following from the Outgoing Queue:

Button	Name	Use this button to...
	Log in/out	Log into the FAX Server to send and receive messages.
	New Fax	Create a New Fax See **Sending Faxes** on page **24** for more information.
	View	View the selected fax message. See **Viewing Faxes** on page **43** for more information.
	Edit	You can do the following: • Change the **Name**, **Fax Number** and **Company** of the fax message contact, as well as the **Subject**. • You can also **Schedule** when you want the fax message to be transmitted. See **Scheduling a Fax** on page **30** for more information.
	Hold	Temporarily halt the transmission of the selected fax message. See **Suspending (Holding) a Fax** on page **37** for more information.
	Release	Allow 4-Sight FAX Server to continue transmitting a suspended fax message. See **Releasing a Suspended Fax** on page **37** for more information.
	Refresh	Update the Outgoing Queue list.
	Forward	Forward the selected fax message to a different list of contacts other than the original list.
	Resend	Allow the 4-Sight FAX Server to attempt to send a fax message with a current status of **Rejected**, **Suspended** or **Failed**. See **Resending a Fax** on page **32** for more information.
	Reject	Prevent the 4-Sight FAX Server from transmitting the selected fax message.

Button	Name	Use this button to...
	Delete	Permanently remove the fax message from the 4-Sight FAX Server.
	Help	Access the online help system.

What the Outgoing Queue Displays: The following describes the columns in the **Outgoing** queue.

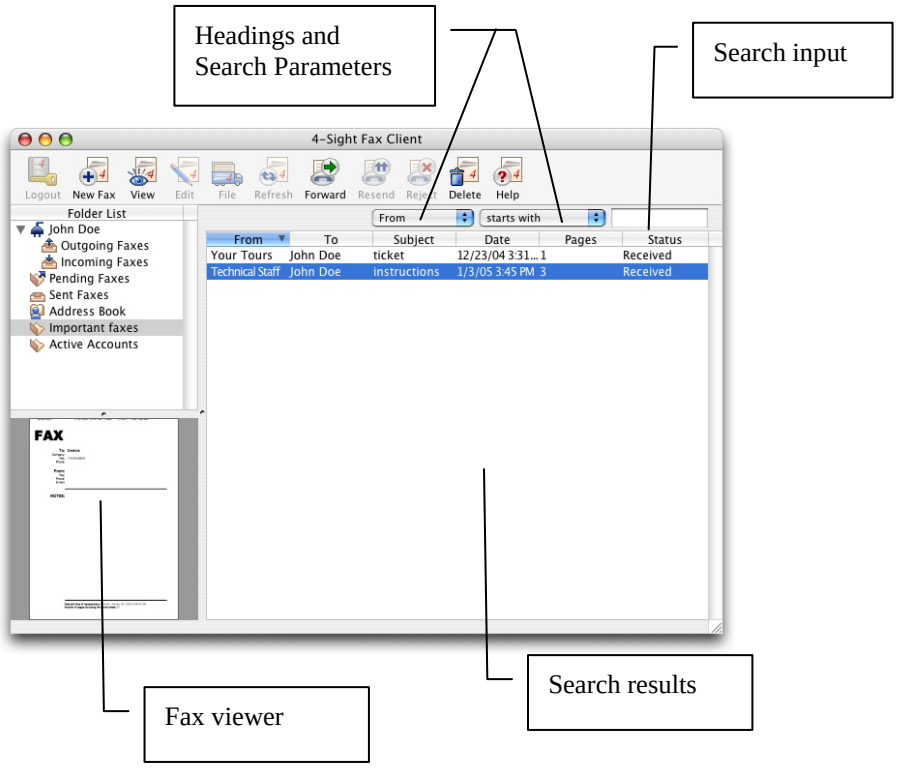
Item:	Displays….
Pos (Position)	The position of each fax in the Server queue. The Server processes faxes on a first in first out basis. **Note:** • Priority faxes are inserted into the queue before non-priority ones.
To	The intended contact(s) of the fax message.
Subject	The subject or title of the fax message.
From	The originator of the fax message.
Date	The date and time at which the fax message was sent from the 4-Sight FAX Server. **Note:** • The Date field also displays the future date and time when a Scheduled fax message will be sent.

Item:	Displays...
Status	The status of a fax message: Fax messages can have the following status: **Waiting -** the fax message has not yet been processed by the 4-Sight FAX Server. **Imaging -** the fax message is being converted into TIFF format, which is suitable for faxing. **Imaged** - the fax message has been converted and is ready to be sent. **Prep x/y** - the x page of y pages is currently being prepared, i.e., 1/4 is the first page of four. **Page x/y -** the fax message is being transmitted. The 4-Sight FAX Server displays the current page being sent (the x) and the number of pages to be faxed (the y). **Failed -** the number of attempts to transmit the fax message exceeded the number of attempts defined by the fax administrator. **Max Retries -** the fax message has failed to be transmitted after the maximum number of times, as defined by the fax administrator on the 4-Sight FAX Server. **Suspended -** the fax message has been suspended by a user or by the administrator and will remain in the queue until manually unsuspended, archived or deleted. **Rejected -** the fax message has been rejected. This could be due to a user manually rejecting the fax, or because the Server has been configured to reject grayscale faxes. **Sent -** the fax message has been successfully transmitted.

Tips:

- To view another user's sent faxes, click the **Show All** check box.
- To view a fax, double-click on its listing in the queue.
- Private faxes can only be viewed by their owner.

Searching the Incoming and Outgoing Fax Queues



How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.

   - Under the **Folder List,** click on the **Incoming Faxes** or **Outgoing Faxes** button.

2. Decide if you want to search only your faxes or everyone's faxes.

   - Click the Show All option to view and search through all faxes.

   - Clear the Show All option to view and search through only your faxes.

3. Select a field and search operator, and then provide the appropriate input to define your search.

Fields	Search Operators
• Pos. • To • Subject • From • Date • Status	• Starts with • Ends with • Is • Is empty • Contains • Does not contain • Is less than • Is greater than

4. The filtered faxes are displayed.

5. To remove the filter, clear the field that you entered information to enable the search.

Notes:

- The **Show All** option is only available if you have the **Full Queue Access** granted by the 4-Sight FAX Administrator.

- Use the *Is less than* (<) and *Is greater than* (>)operators when searching on the position (Pos.) of a fax.

Working with the Pending Faxes Folder

What you can do from the Pending Faxes Folder:

Use the Pending Faxes folder to display information about fax messages that have been created while you were off-line (not connected to the fax Server).

Button	Name	Use this button to...
	New Fax	Create a New Fax See **Sending Faxes** on page **24** for more information.
	View	View the selected fax message. See **Viewing Faxes** on page **43** for more information.
	Edit	You can do the following: • Edit any aspect of a Pending fax. • You can also **Schedule** when you want the fax message to be transmitted. The default scheduling is 'send now'. See **Scheduling a Fax** on page **30** for more information.
	Delete	Permanently remove the fax message from the 4-Sight FAX Server.
	Help	Access the online help system.

The following describes the columns in the **Pending Faxes** queue.

Item:	Displays...
To	The intended recipient(s) of the fax message.
Number	The fax number of the intended recipient(s).
Subject	The subject matter or title of the fax message.
From	The originator of the fax message.
Date	The date and time that the fax was sent to the Fax Server. **Note:** • If a fax is scheduled for a later time, the Date field shows the date and time when the fax will be sent.

Tips:

- To view other users' faxes, click the **Show All** check box.
- To view a fax, double-click on it.

Notes:

- The **Show All** option is only available if you have the **Full Queue Access** granted by the 4-Sight FAX Administrator
- You can remove fax messages from the Pending Faxes queue by selecting it and clicking the icon.

Working with the Sent Faxes Folder

Use the **Sent Faxes** folder to display information about the status and history of fax messages that you have successfully sent.

The following chart shows what you can do from the **Sent** folder:

Button	Name	Use this button to...
	New Fax	Create a New Fax. See **Sending Faxes** on page **24** for more information.
	View	View the selected fax message. See **Viewing Faxes** on page **43** for more information.
	Forward	Forward the selected fax message to a different list of recipients other than the original list. See **Forwarding a Fax** on page **33** for more information.
	Delete	Permanently remove the fax message from the 4-Sight FAX Server.
	Help	Access the online help system.

What the Sent Queue Displays:

The following describes the columns in the **Sent** queue.

Item:	Displays...
To	The intended recipient(s) of the fax message.
Fax number	The number the fax Server dialed to send the fax message.
Subject	The subject matter or title of the fax message.
From	The originator of the fax message.
Date	The date and time at which the fax message was sent to the 4-Sight FAX Server. **Note:** • If a fax is scheduled for a later time, the Date field shows the date and time when the fax will be sent.

Working with the Personal Folders

What you can do from the Personal Folder:

Use the Personal folder to keep fax messages that you do not want to lose or have readily available.

The following chart shows what you can do from a Personal Folder:

Button	Name	Use this button to...
	New Fax	Create a New Fax See **Sending Faxes** on page **24** for more information.
	View	View the selected fax message. See **Viewing Faxes** on page **43** for more information.
	Forward	Forward the selected fax message to a different list of contacts other than the original list.
	Delete	Permanently remove the fax message from the 4-Sight FAX Server.
	Help	Access the online help system.

How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.

2. Do one of the following to continue:

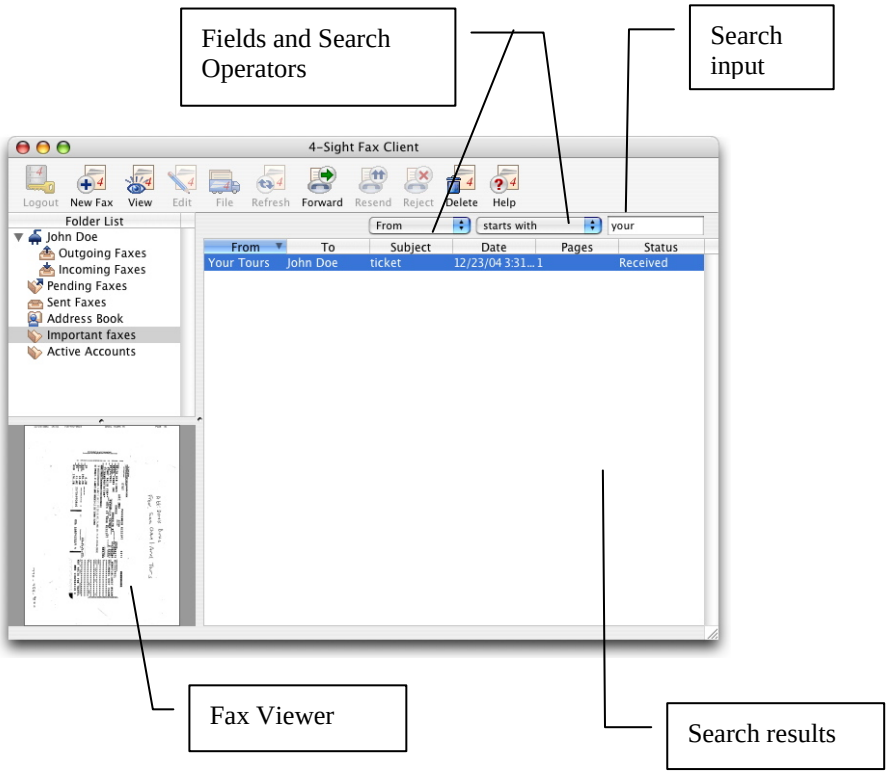
To	Description
Create a new personal folder	• From the **File** menu, click **New** and select **Folder**. • Enter the name of your personal folder and click **OK**. Your personal folder appears underneath the 4-Sight FAX Address Book. **Note**: • You can have as many personal folders as you want.
Rename a personal folder	• Double-click on an existing personal folder. A dialog box appears. • Enter the new name of this folder and click **Apply**.
Delete a personal folder	Select the personal folder you want to permanently delete and click . **Warning:** • You cannot undo this action. • All items in this folder will be deleted.

Tips:

- See **Searching the Various Fax Folders (Sent Faxes, Pending Faxes and Personal Folders)** on page **77** for more information.

- See **Filing Faxes to Personal Folders** on page **79** for more information.

Searching the Various Fax Folders (Sent Faxes, Pending Faxes and Personal Folders)



How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.

   - Under the **Folder List,** click on the icon for **Pending Faxes, Sent Faxes** or your personal fax folder.

2. Select a field and search operator, and then provide the appropriate input to define your search.

3. The filtered faxes are displayed.

Note:

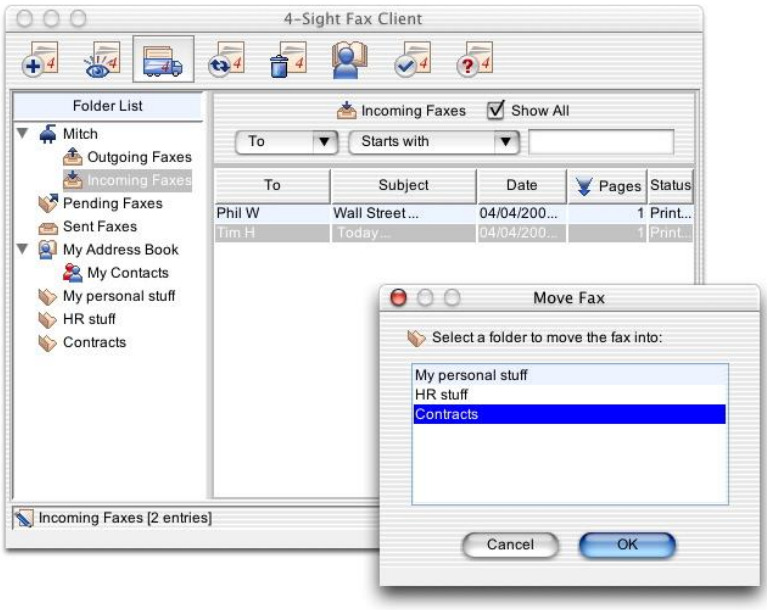
- To remove the filter, clear the search input field.

Managing Faxes

Managing faxes includes the following tasks:

Task:	Description:
Assigning faxes	To assign fax messages to a 4-Sight Client user. See **Assigning Faxes** on page **48** for more information.
Filing faxes to a personal folder	To File faxes from the Incoming queue to a folder you created for safe personal keeping. See **Filing Faxes to Personal Folders** on page **79** for more information.
Opening a fax	To view a fax in the Fax Composer. See **Opening Previously Saved** Faxes on page **49** for more information.
Saving a fax	To keep a permanent copy of a fax message outside of 4-Sight FAX. See **Saving Faxes** on page **80** for more information.
Deleting a fax and address book contacts	Permanently remove a fax message from your hard drive. See **Deleting Faxes and Address Book Contacts** on page **80** for more information.
Edit the properties of a fax in the Outgoing queue	To change the contact fax information, schedule the fax for the future and view the fax. See **Working with the Outgoing Queue** on page **67** for more information.

Filing Faxes to Personal Folders



How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.

   - Under the Folder List, click on the Incoming Faxes button.

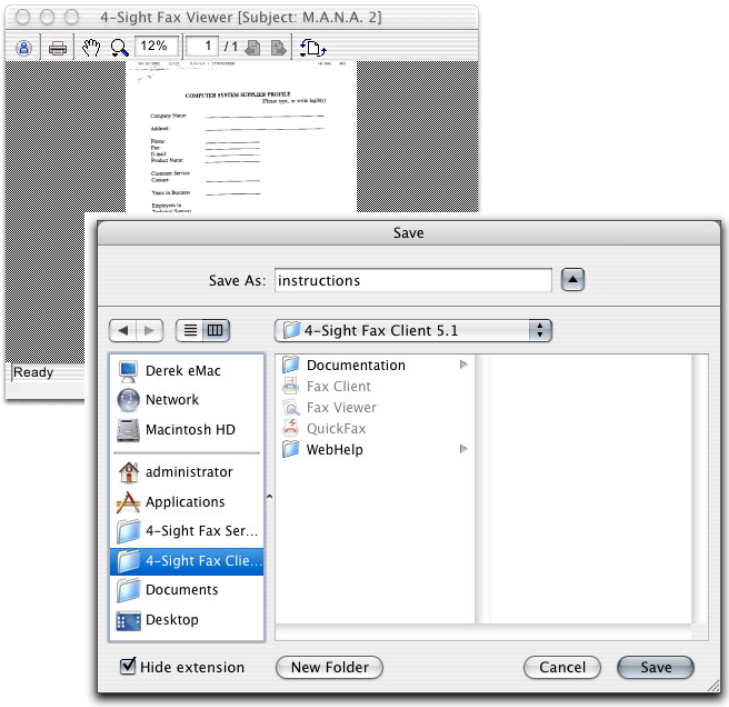
2. Select the fax you want to file to your personal folder.

3. Click the **File** icon .

   - If you have more than one personal folder, decide which folder you want to file the fax message into.

4. Click **OK**.

Saving Faxes



How do I?

1. Launch the 4-Sight FAX Client application and log into the 4-Sight FAX Server.
2. Do the following to view the fax:
   - To view a received fax, access the **Incoming Queue** or a **Personal folder**, if you moved the fax from the Incoming Queue. Double-click on the fax listing.
   - To open a saved fax, select **Open Fax** from the **File** menu. Locate the fax message and then click **Open**.
3. Once the viewer is open, click **Save** from the **File** menu.
4. Choose where you want to save the fax and click **Save**.

Deleting Faxes and Address Book Contacts

How do I?

1. Click on the appropriate queue or folder from which you want to permanently remove fax messages or address book contacts.
2. Select the fax messages or address book contacts to you want to delete.
3. Click the Delete button .

Notes:

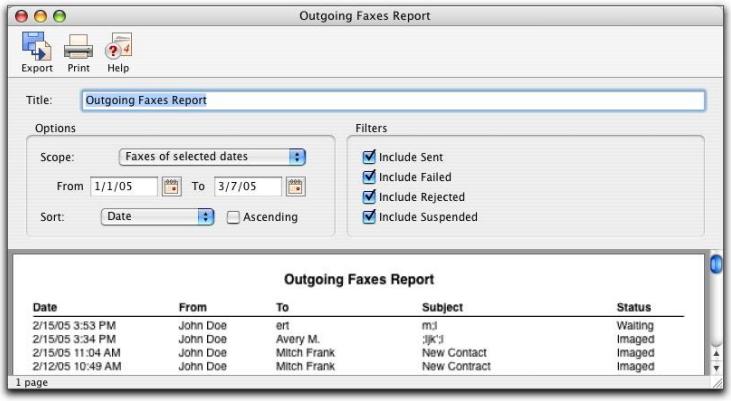
- You can delete client address book contacts, as well as 4-Sight FAX Server contacts with the appropriate 4-Sight FAX Server rights.
- If you want to delete an Apple based address book contact, you must the contact directly from the Apple address book.

Managing Reports

Use the 4-Sight FAX Client reporting capabilities to view, sort/filter and print activity for the Outgoing and Incoming queues.

Outgoing Fax Reports

You can filter your results based on the status of the outgoing fax; Sent, Failed and Rejected. You can also decide whether or not to include those faxes that were suspended by the user.



How do I?

1. Launch the **4-Sight FAX Client** application and log into the 4-Sight FAX Server.
2. On the **Tools** menu, click **Outgoing Faxes Report**.
3. Decide the time from at which your report should begin. The following chart displays your options:

Scope	Base the Outgoing Faxes Report on…
Faxes of Today	Faxes sent or attempted to be sent within the current calendar day.
Faxes of this week	Faxes sent or attempted to be sent within the current calendar week.

All Faxes	All faxes regardless of date.
Faxes of Selected Dates	Faxes sent or attempted to be sent within the dates you specify.

4. Choose the **Filters** you want to use.

Filters	Description
Sent	Those faxes with a status of **Sent**.
Failed	Those faxes with a status of **Failed**.
Rejected	Those faxes with a status of **Rejected**.
Include Suspended	Include those faxes with a status of **Suspended.**

5. Provide the name that you want to appear at the top of the printed report. The default name is **Outgoing Faxes Report**.

6. View the report.

7. The printed report will only print what is visible in the columns.

8. Use the following chart to continue:

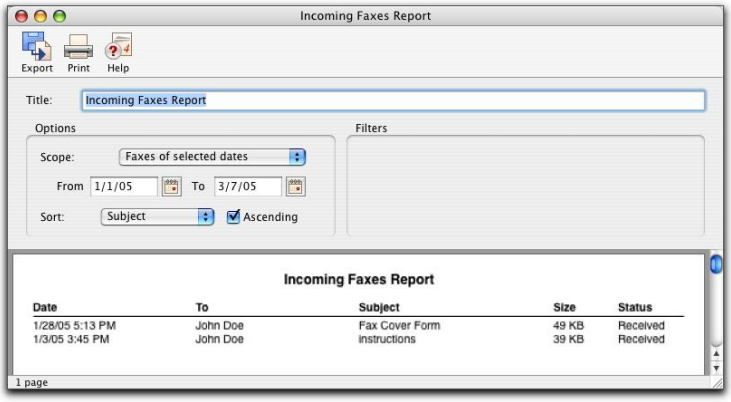
Click…	To…
Print	Receive a hard copy of the report.
Export	Save the report information to a tab-delimited text file. Use the tab-delimited text file to import the information into another 3rd party spreadsheet or reporting application.

Note:

- You can run reports on your faxes, however, if you have the appropriate 4-Sight FAX Server privilege – Full Queue Access, then you can print a report for all faxes on the server.

Incoming Fax Reports

You can filter your results based on the time and date you specify.



How do I?

1. Launch the **4-Sight FAX Client** application and log into the 4-Sight FAX Server.

2. On the **Tools** menu, click **Incoming Faxes Report**.

3. Decide the time from which you want to base your report. You can choose from the following options:

Scope	Base the Incoming Faxes Report on…
Faxes of Today	Faxes received within the current calendar day.
Faxes of This Week	Faxes received within the current calendar week.
All Faxes	All faxes regardless of date.
Faxes of Select Dates	Faxes received within the dates you specify.

4. Provide the name that you want to appear at the top of the printed report. The default name is **Incoming Faxes Report**.

5. View the report.

6. The printed report will only print what is visible in the columns.

7. Use the following chart to continue:

Click…	To…
Print	Receive a hard copy of the report.
Export	Save the report information to a tab-delimited text file. Use the tab-delimited text file to import the information into another 3rd party spreadsheet or reporting application.

7. Fine Tuning

In this chapter:

Topic	Page
Preferences	88

Preferences

Use Preferences to fine-tune your 4-Sight FAX Client.

Tab:	What you can do…
Fax	• Define outgoing fax priority. • Default cover page (fax) resolution. • Option to select from multiple accounts on the client machine from which to send messages. • Choose whether to save a copy of outgoing faxes to the Sent Faxes folder. • Define the default zoom when viewing fax messages.
Feedback	• Enable/Disable 4-Sight FAX to display a confirmation message box when deleting a fax message. • Enable/Disable 4-Sight FAX to play sounds when an event occurs, such as sending or receiving a fax message.
Advanced	• Select the default language you want 4-Sight FAX Client to use. • Decide if you want 4-Sight FAX Client to automatically check for updates. • Choose your Country of origin. • Decide what you want to view when you launch and log into 4-Sight FAX. You can open the main window or launch the Fax Composer.

Fax Preferences (Outgoing Faxes)

How do I?

1. Launch 4-Sight FAX Client.
   - Mac – On the **Fax Client** pull-down menu, select **Preferences**.
   - Windows – On the **Tools** pull-down menu, select **Preferences**.
2. Click the **Fax** tab. Decide which option(s) you want.

Option	Description:
Default Priority	Define outgoing fax resolution and priority. You can select from the following options: • Bulk • Normal • Urgent • Important • ASAP
Cover page resolution	Default cover page (fax) resolution. You can select **Fine, which provides greater detail, good for graphics, although it takes longer to send,** or **Standard, which is good for text only and is faster to send**.
Show "Account" popup	Select this if you have the option to select from multiple accounts on the client machine. When sending faxes, you can select which account you want to send messages. Otherwise, only currently logged in or last account used is displayed.
Save copy of outgoing in Sent Faxes folder	Enable/Disable the option to save successfully transmitted messages to Sent folder.

Option	Description:
Default Zoom	Define the default zoom when viewing fax messages. You can select from the following view options: • Fit Page • Fit Width • Fit Height • Choose from 25% through 200% magnification

3. Click **OK**.

Tip:

- Click **Reset** to return all options and values to their default settings.

Feedback Preferences

How do I?

1. Launch 4-Sight FAX Client.
   - Mac – On the **Fax Client** pull-down menu, select **Preferences**.
   - Windows – On the **Tools** pull-down menu, select **Preferences**.
2. Click the **Feedback** tab. Decide which option(s) you want.

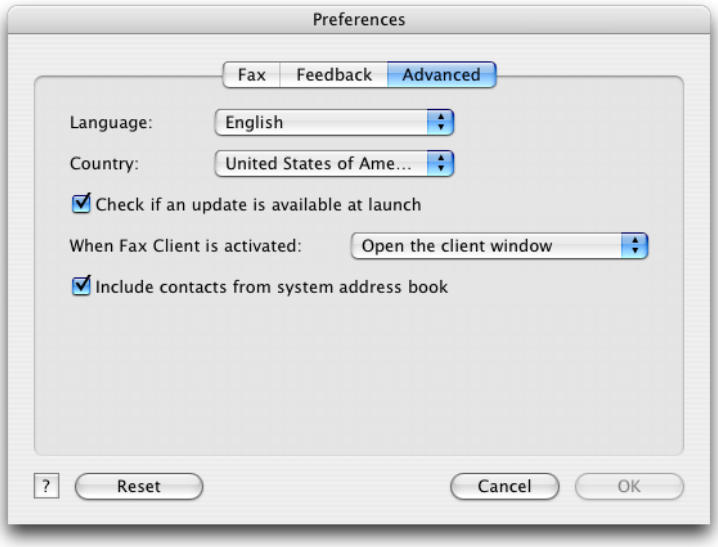
Option	Description:
Confirm before deleting	Enable/Disable the option to display a confirmation message box when deleting a fax message.
Play sounds	Enable/Disable the option to choose if you want to play sounds when an event occurs, such as sending or receiving a fax message.

3. Click **OK**.

Tip:

- Click **Reset** to return all options and values to their default settings

Advanced Preferences



How do I?

1. Launch 4-Sight FAX Client.
   - Mac – On the **Fax Client** pull-down menu, select **Preferences**.
   - Windows – On the **Tools** pull-down menu, select **Preferences**.
2. Click the **Advanced** tab. Decide which option(s) you want.

Option	Description:
Language	Select which language you want to use in the 4-Sight Fax Client.
Country	Select the country from which you are using 4-Sight Fax Client. If you make use of Smart Dialing, the appropriate country code is used when dialing.
Check if an update is available at launch	Select this option if you want 4-Sight Fax Client to automatically check if an update is available.
When Fax Client is activated	Decide which 4-Sight Fax Client you want to appear when 4-Sight Fax Client is started. You can select the following:

	• Open the client window • Open Fax Composer window
Include contacts from system address book	Decide if you want to make use of 4-Sight Fax Server based address book entries. **Note:** • If your were given the appropriate 4-Sight FAX Server privileges, you can also add (save), delete, and modify fax server address book entries.

3. Click **OK**.

Tip:

- Click **Reset** to return all options and values to their default settings

Appendix A: Need Assistance?

In this chapter:

Topic	Page
Contacting Technical Support	96

Contacting Technical Support

There are three ways to get technical support:

Type of Support	Details	Requires Support Agreement
Phone support	9am-5pm Eastern Time 770-457-9400 International support available.	Yes
Email support	support@softsinc.com	Yes, once the 30-day installation support period expires.
Fax support	770-454-9800	Yes, once the 30-day installation support period expires.

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